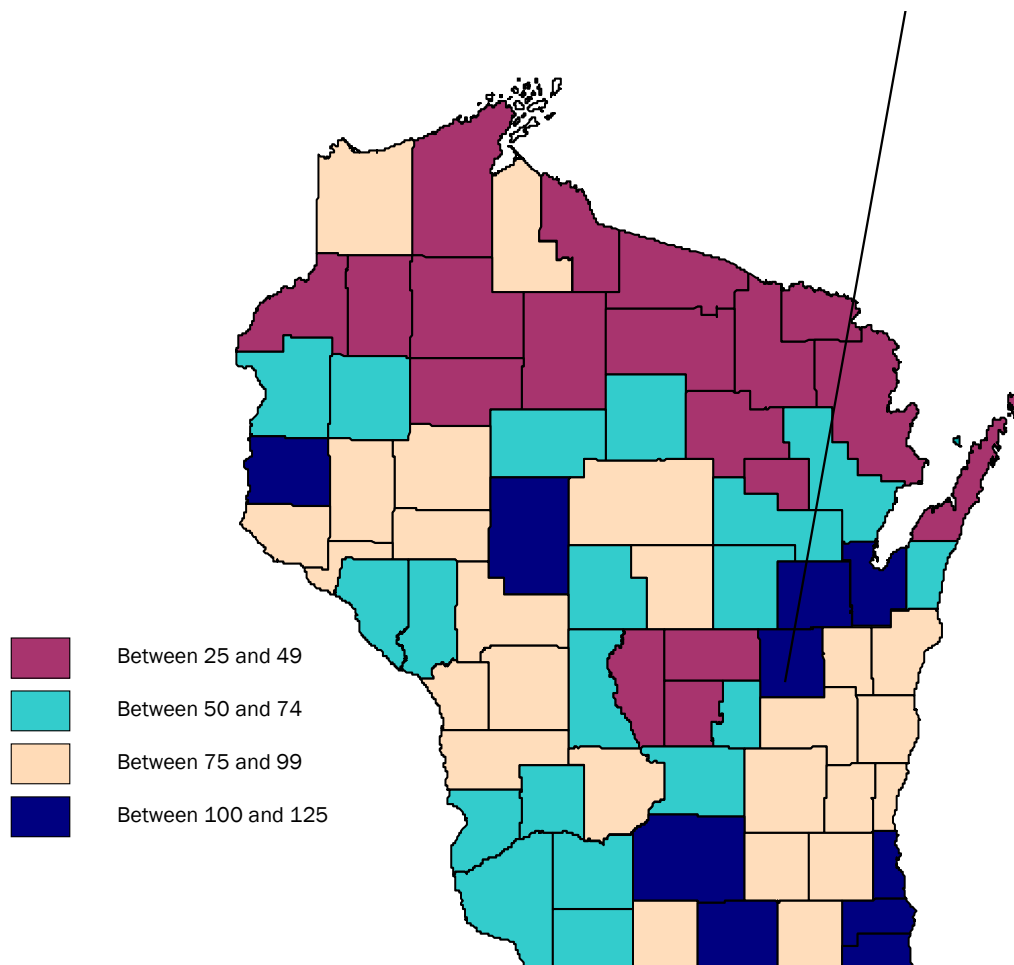


Winnebago County Workforce Profile



The number of residents aged 25-29 years for every
100 residents aged 60-64 years in year 2025



Source: Wisconsin Department of Administration, Demographic Services Center and the U.S. Bureau of Census.

For comparison, it is projected that there will be 90 residents aged 25-29 for every 100 residents aged 60-64 in Wisconsin in 2025. Nationally, it is projected that there will be 101 residents aged 25-29 for every 100 residents aged 60-64. In 2003, Wisconsin had 146 residents aged 25-29 for every 100 aged 60-64.



County Population

Winnebago County's population has grown faster than the State of Wisconsin and just slightly slower than the nation since the 2000 Census. Its growth rate was 3.3 percent, below the 3.9 percent growth rate for the nation and above the state's growth rate of 3.1 percent. Since the Census, the county's population has increased by 5,100 residents.

Total Population

	April 2000 Census	Jan. 1, 2004 estimate	Numeric change	Percent change
United States	281,421,906	292,287,454	10,865,548	3.9%
Wisconsin	5,363,704	5,532,000	168,296	3.1%
Winnebago County	156,763	161,863	5,100	3.3%
Largest Municipalities				
Oshkosh, City	62,916	65,095	2,179	3.5%
Neenah, City	24,507	25,193	686	2.8%
Menasha, Town	15,858	16,695	837	5.3%
Menasha, City*	15,643	15,655	12	0.1%
Algoma, Town	5,702	6,024	322	5.6%
Omro, City	3,177	3,312	135	4.2%
Clayton, Town	2,974	3,301	327	11.0%
Oshkosh, Town	3,234	2,808	-426	-13.2%
Neenah, Town	2,657	2,745	88	3.3%
Winneconne, Village	2,401	2,501	100	4.2%

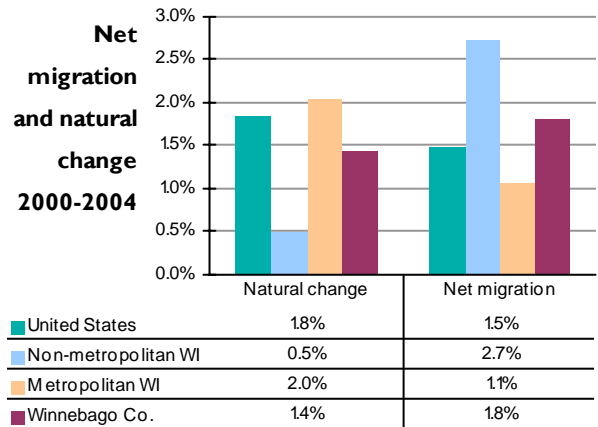
*Winnebago County portion only

Source: Wis. Dept. of Administration, Demographic Services and U. S. Census Bureau

Only one of the county's ten largest municipalities had a population decrease over the last 4 years and that was the Town of Oshkosh. The town had a loss of 426 residents for a decline of 13.2 percent. On the other extreme, the Town of Clayton had the greatest growth rate of 11.0 percent with an increase of 327 residents. The City of Oshkosh had the largest increase. The city grew 3.5 percent, just slightly faster than the county and added 2,179 residents. The differences in population growth occurs for a variety of reasons. In some cases, a municipality becomes "landlocked" and cannot expand, in other areas the municipality may gain or lose population through the process of annexation.

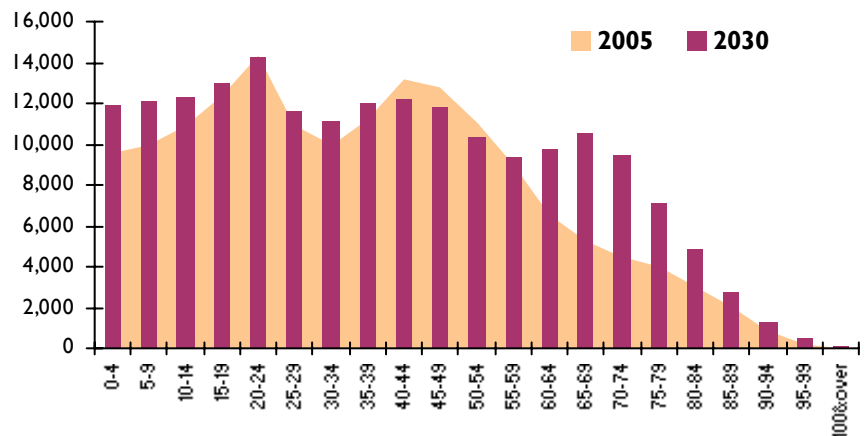
The two sources of population growth are natural increase which is the number of births minus the number of deaths and net migration which counts the number of residents moving into the county and subtracts the number moving out of the area. Over 56 percent of the county's growth was due to net migration. This is slightly different than the average for metropolitan counties in the state where just under 35 percent of growth comes from net migration. The growth pattern is also quite different than in the non-metro counties in the state where nearly 85 percent of new population growth comes from net migration. This is often the result of older populations in these areas.

Although the county has an aging population, unlike



Source: WI Dept. of Admin., Demographic Services and U. S. Census Bureau

Population by Age Groups in Winnebago County



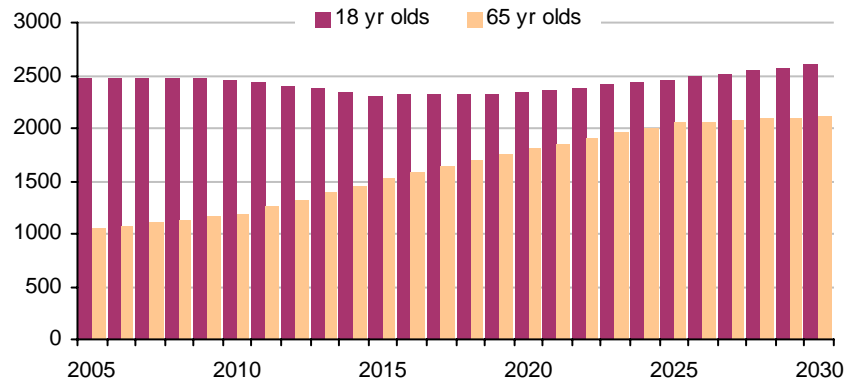
Source: WI Dept. of Administration, Demographic Services

Future Population and Labor Supply

many counties in Wisconsin, it is not aging as fast as most. This will affect the labor force in the years to come. During the next 25 years, there will be a larger portion of the population that are aged 65 and older with a lower percentage of the population aged 18. Generally these two groups have lower participation rates than the middle aged population. The result of the aging of the population will be fewer new workers in the labor force to provide replacements for those retiring and possibly slowing economic growth in the county. While the number turning age 18 is expected to remain greater than those turning 65, this is not true in the more rural counties in the state, some of which are already experiencing a greater number reaching retirement age than labor force age. Participation in the labor force is not only affected by age, but also by education, race and ethnic backgrounds. Currently minority participation rates are increasing, while participation of the white population is declining. Other factors include education and the health of the local economy.

The aging of the population will not only reflect on the make up of the labor force, but will most likely impact the types of businesses that develop in the area creating

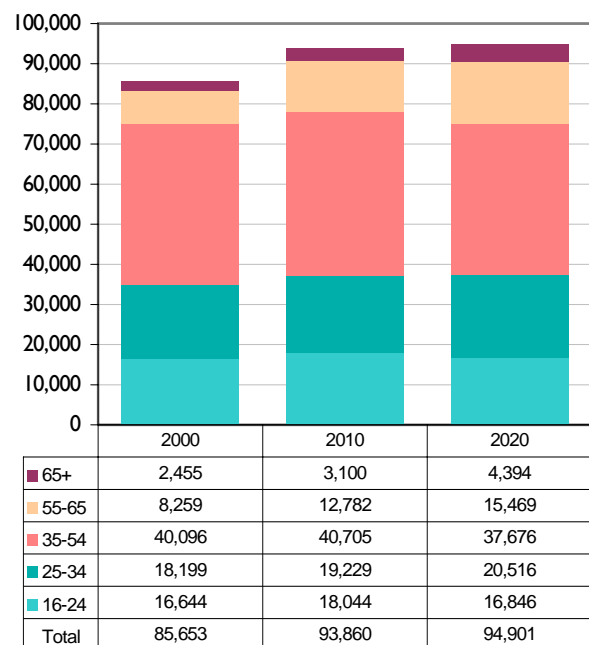
Convergence of 18 & 65 year old population in Winnebago County



Source: WI Dept. of Administration, Demographic Services

new opportunities and challenges for entrepreneurs and economic developers to provide services with a declining labor pool. An older population will have different needs than the current population in areas such as services, leisure and hospitably, retail trade, housing and health care. As the aging population moves through life, the type of work that they want to do is also likely to change.

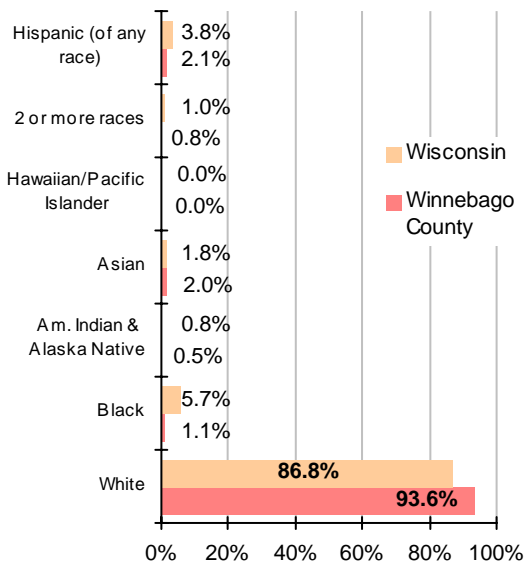
Winnebago County Labor Force Projections by Age



Decade change	17.9%	9.6%	1.1%
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Source: DWD, Office of Economic Advisors, August 2004

Race and ethnic distribution



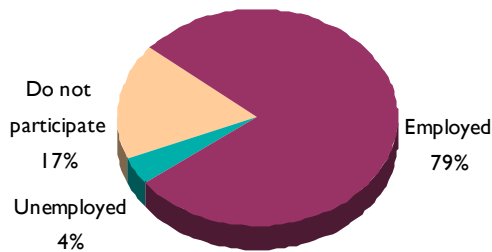
Source: U.S. Census 2000, SF-3, table P-6

Current Labor Force

Labor force participation represents the share of population that is 16 years and older that is either employed or unemployed. Participation rates in Wisconsin and the United States in 2003 were 72.9 and 66.3 percent, respectively.

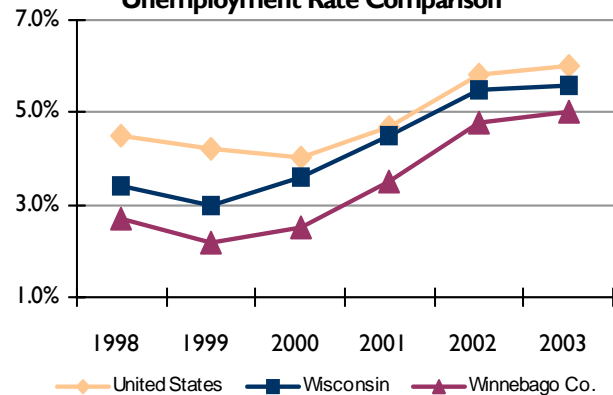
population ages, more retirees will be included in the category of choosing not to work and labor force participation rates will decline. Future workers will need to come from the younger generation and individuals moving to the area.

Labor force participation in Winnebago County



Source: DWD, Office of Economic Advisors, July 2004

Unemployment Rate Comparison



The participation rate in Winnebago County is above the state and national rates at 83 percent. This leaves 17 percent of the population as a pool for economic expansion. That includes some students, individuals who choose not to work including retirees, as well as those that are unable to work at the present time. As the

Winnebago County Civilian Labor Force Data

	1998	1999	2000	2001	2002	2003
Labor Force	96,395	93,721	98,234	100,223	100,065	101,210
Employed	93,788	91,624	95,766	96,758	95,261	96,157
Unemployed	2,607	2,097	2,468	3,465	4,804	5,053
Unemployment Rate	2.7%	2.2%	2.5%	3.5%	4.8%	5.0%

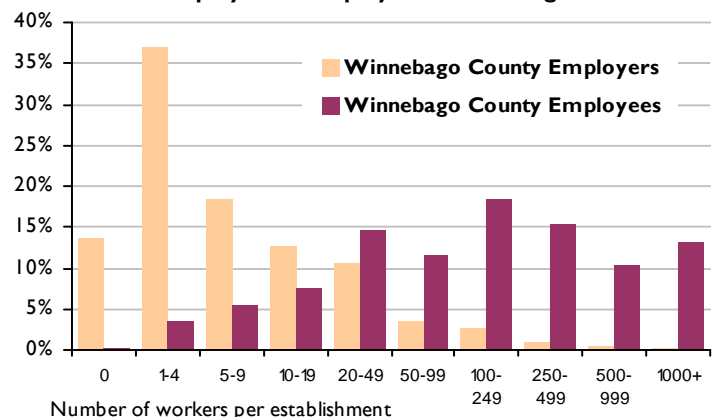
Source: WI DWD, Bur. of Workforce Information, Local Area Unemployment Statistics, 2003

Employers by Size

Nearly 80 percent of the county's employers have less than 20 workers. These employers provide less than 20 percent of the county's jobs. Less than five percent of the employers in the county have over 250 workers. This five percent provides almost 40 percent of the county's jobs.

Although the small employers do not provide a high percent of the jobs, these are often the businesses of the future, and may collectively have a faster growth rate than their large counterparts. A healthy community will have a good mix of both large and small firms to encourage continuing economic growth.

Share of employers & employees in size range in 2003



Source: DWD, Bureau of Workforce Information, Table 221, July 2004

Industry & employers by size

Although the prominence of manufacturing has declined in the state and nation in recent years, it is still a major factor in the county's employment. The data below lists the top ten employment industries in the county of which two are in manufacturing. The bottom table lists the ten largest employers in the county. Six of these are manufacturers. Professional and technical services has been the fastest growing industry during the last five years, increasing by over 50 percent. This has been offset by large losses in the paper manufacturing industry

over the last five years. These ten industry groups provide nearly one half of the jobs in the county.

The ten largest employers in the county make up less than one percent of all of the public and private employers in the county, but provide one out of every five jobs in the county. Changes in the fortunes of these company affects the overall economy of the area. All of these companies have over 1,000 employees.

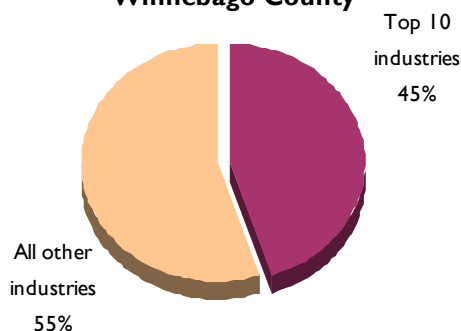
Top 10 Industries in Winnebago County

Industry	March 2004		Numeric Employment Change	
	Establishments	Employees	2003-2004	1999-2004
Paper manufacturing	36	6,687	-46	-5,199
Educational services	22	5,482	-161	514
Food services & drinking places	252	4,677	-486	-263
Transportation equipment manufacturing	12	3,731	-14	166
Management of companies & enterprises	30	3,580	158	2,353
Administrative & support services	117	3,108	-348	-274
Hospitals	3	3,077	-74	-273
Ambulatory health care services	189	3,038	26	-485
Professional & technical services	213	2,993	-210	996
Nursing & residential care facilities	38	2,776	9	142

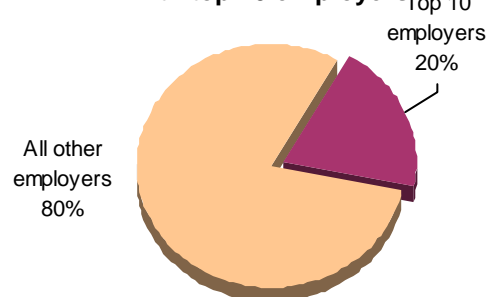
Top 10 Employers in Winnebago County

Establishment	Product or Service	Size (Dec. 2003)
Kimberly Clark Global Sales Inc.	General warehousing and storage	Over 999 employees
Curwood Inc.	Nonpackaging plastics film and sheet mfg.	Over 999 employees
Kimberly-Clark Corp.	Coated and laminated paper manufacturing	Over 999 employees
Oshkosh Truck Corp.	Heavy duty truck manufacturing	Over 999 employees
Thedacare Inc.	Offices of physicians, except mental health	Over 999 employees
University of Wisconsin- Oshkosh	Colleges and universities	Over 999 employees
Oshkosh Public School	Elementary and secondary schools	Over 999 employees
Pierce Mfg. Inc.	Motor vehicle body manufacturing	Over 999 employees
Plexus Services Corp.	Printed circuit assembly manufacturing	Over 999 employees
County of Winnebago	Other individual and family services	Over 999 employees

Share of jobs in top 10 industries in Winnebago County



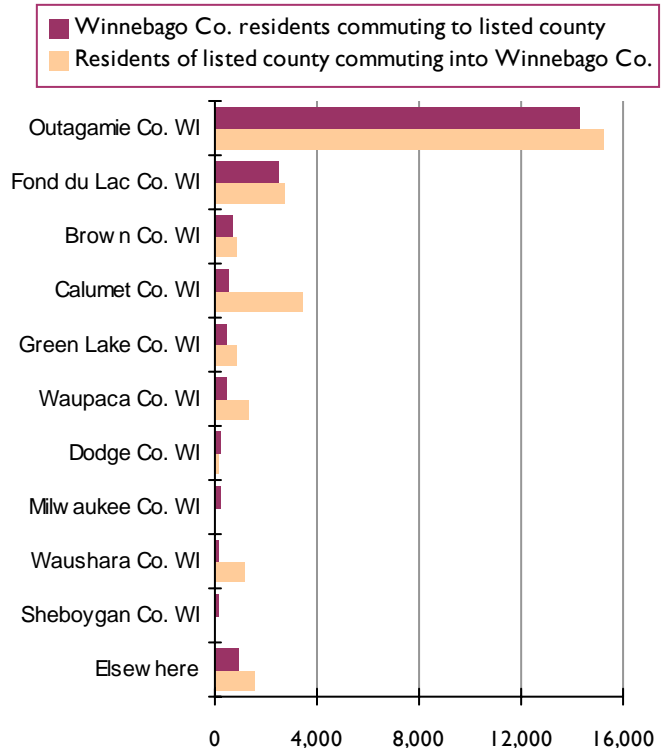
Share of Winnebago County jobs with top 10 employers



Commuting

Winnebago County is part of the Appleton/Oshkosh/Neenah Metropolitan Statistical Area (MSA). Generally large metropolitan areas attract workers from outside of their boundaries for a variety of reasons such as: more employment opportunities, a greater diversity of occupations, and usually higher average wage than non-metropolitan areas. Many of these commuting patterns have been in existence for decades. Patterns usually do not change a great deal over time, although the percentages and numbers change to reflect events in the local and national economy.

Winnebago is an importer of workers. The county has nearly 20,700 workers that leave the county for jobs in other counties. Most of these workers are going to nearby counties, although some may work in areas almost 100 miles away. The largest number of the workers leaving the county go to Outagamie County. At the same time over 27,400 enter the county for employment. The net exchange of commuting workers is over 6,700 more that enter the county.



Source: U.S. Census 2000, Special tabulations: Worker Flow Files

Key occupations & wages

The table to the right includes occupations that are common in the area. The list is not all inclusive and for information on additional occupations refer to the Office of Economic Advisors website: <http://dwd.wisconsin.gov/oea/>. Wage tables are general guides to what is happening in the local labor market. The surveys are sent to approximately one third of the employers in the state every year.

The surveys provide assistance to workers in knowing their worth on the market as well as employers that are looking to hire new workers and want to know what the "going rate" is. Note the table excludes the top and bottom 25 percent of wages, so there will be instances when the wages will be either above or below those listed on the table.

Occupation title	Hourly Wages			
	Mean	Percentile		
		25 th	50 th	75 th
Retail salespersons	\$10.96	\$7.23	\$8.42	\$11.86
Cashiers	\$7.83	\$6.55	\$7.65	\$8.77
Laborers & freight, stock, & material movers, hand	\$10.84	\$8.04	\$9.92	\$13.03
Office clerks, general	\$10.84	\$8.51	\$10.32	\$12.64
Customer service representatives	\$13.24	\$10.01	\$12.63	\$15.66
Waiters & waitresses	\$7.06	\$5.97	\$6.57	\$7.78
Truck drivers, heavy & tractor-trailer	\$17.55	\$13.31	\$16.71	\$21.40
Comb. food prep. & serving workers (fast food)	\$7.12	\$6.16	\$6.96	\$8.01
Team assemblers	\$13.02	\$10.73	\$12.83	\$15.16
Sales reps, whls. & mfg, except tech. & scientific	\$24.21	\$15.45	\$21.63	\$30.25
Janitors & cleaners, except maids & housekeeping	\$10.70	\$8.32	\$10.13	\$12.65
Bookkeeping, accounting, & auditing clerks	\$12.32	\$9.62	\$11.96	\$14.60
Helpers--production workers	\$11.21	\$8.27	\$11.15	\$13.64
Registered nurses	\$23.02	\$20.16	\$23.11	\$26.10
Executive secretaries & admin. assistants	\$13.95	\$10.81	\$13.42	\$16.50
Stock clerks & order fillers	\$10.01	\$7.61	\$8.77	\$11.61
Secretaries, except legal, medical, & executive	\$12.18	\$10.11	\$12.03	\$14.27
Packers & packagers, hand	\$10.30	\$7.93	\$9.61	\$12.49
Nursing aides, orderlies, & attendants	\$10.05	\$8.99	\$9.95	\$11.02
Carpenters	\$18.94	\$13.27	\$18.15	\$24.29

Winnebago County is part of an area which includes Calumet, Outagamie and Winnebago counties.

Source: DWD, Bureau of Workforce Information, Occupation Employment Statistics Survey 2003

Employment and Wages

Average annual wage by industry represents all of the wages paid during the year by that industry and divided by the average number of employees. This includes all classes of workers as well as full time and part time employees. While the average hourly wage has an effect on this, the final result does not necessarily indicate higher hourly wages, as average weekly hours, seasonality of the job, and availability of overtime impact the final outcome.

Average Annual Wage by Industry Division in 2003

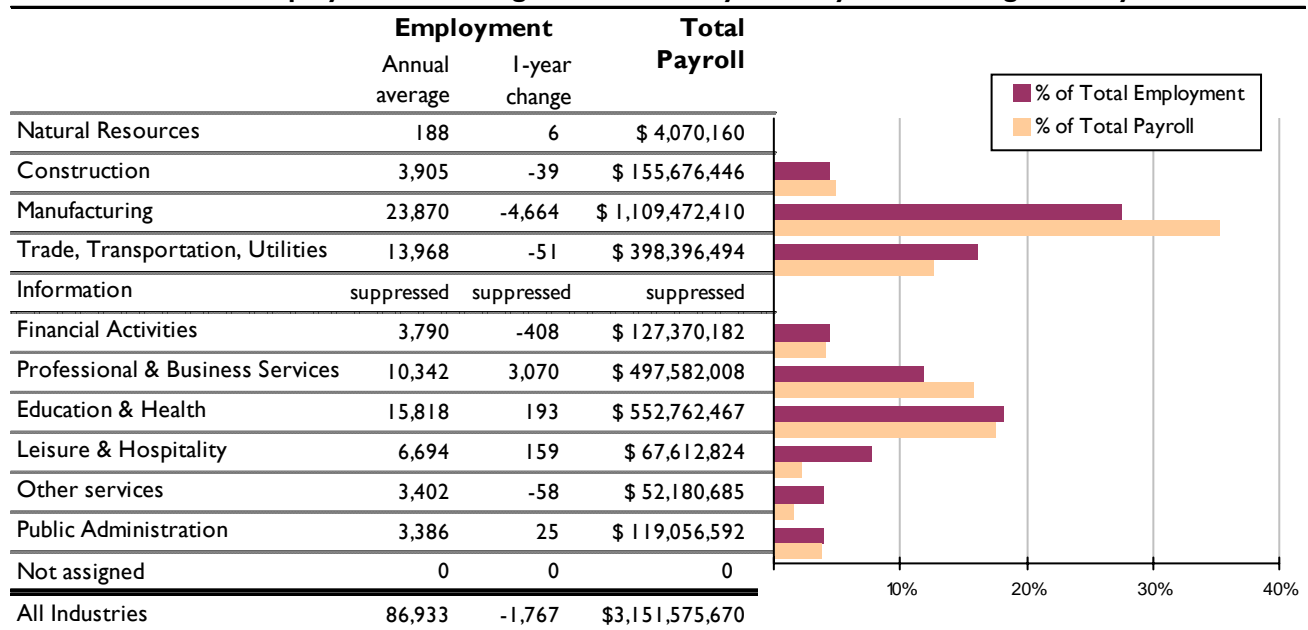
	Average Annual Wage		Percent of	1-year
	Wisconsin	Winnebago County	Wisconsin	% change
All Industries	\$ 33,423	\$ 36,253	108.5%	3.1%
Natural resources	\$ 25,723	\$ 21,650	84.2%	-2.7%
Construction	\$ 40,228	\$ 39,866	99.1%	-1.1%
Manufacturing	\$ 42,013	\$ 46,480	110.6%	-2.6%
Trade, Transportation, Utilities	\$ 28,896	\$ 28,522	98.7%	8.0%
Information	\$ 39,175	suppressed	Not avail	Not avail.
Financial activities	\$ 42,946	\$ 33,607	78.3%	12.1%
Professional & Business Services	\$ 38,076	\$ 48,113	126.4%	27.4%
Education & Health	\$ 35,045	\$ 34,945	99.7%	2.0%
Leisure & Hospitality	\$ 12,002	\$ 10,101	84.2%	3.0%
Other services	\$ 19,710	\$ 15,338	77.8%	0.4%
Public Administration	\$ 35,689	\$ 35,161	98.5%	6.1%

Source: WI DWD, Bureau of Workforce Information, Quarterly Census of Employment & Wages

The average annual wage in the county was well above the average for the state. This is in part the effect of the county being a part of a MSA and the high wages from the manufacturing sector which makes up over one fourth of the jobs in the county. This sector has a high portion of workers in the paper industry. Manufacturing as a whole provides nearly 35 percent of all the county's wages. Manufacturing only makes up a little over 11 percent of the nation's jobs. While this industry is important, it should

be noted that the number of jobs from this industry has declined in Winnebago County over the last ten years. This will have an impact on the economy of the area as it shifts to other sources of income. The decline in this sector is part of a national trend. While the professional and business services sector has less than half the employees as manufacturing, the average annual wage is higher than the manufacturing sector and well above the statewide average for that industry.

2003 Employment and Wage Distribution by Industry in Winnebago County



Source: WI DWD, Bureau of Workforce Information, Quarterly Census Employment and Wages, June 2004

Per Capita Personal Income

Per capita personal income (PCPI) includes income from wages and self-employment, assets (dividends, interest, rent) and transfer payments (social security, insurance, welfare, pensions) divided by mid-year total population estimates.

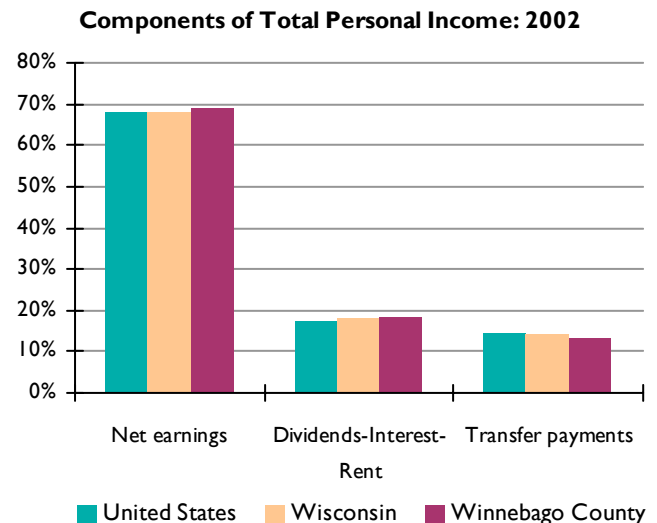
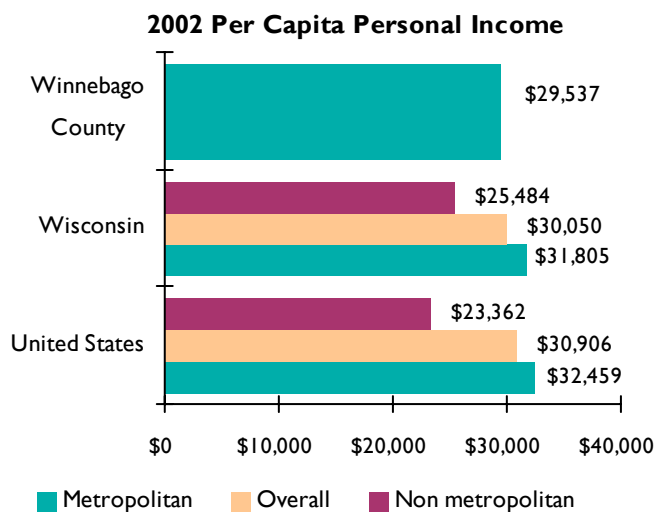
The majority of PCPI in Winnebago County comes from net earnings, with smaller percentages coming from dividends, interests payments, and transfer payments. The percent of income from net earnings is

about the same as the state and national average. There is a higher portion of PCPI coming from dividends, interest and rent payments, which is offset with a lesser percent coming transfer payments.

PCPI in the county was \$29,537 in 2002. This was below the state and the nation. The growth rate for the county's PCPI over the last year was greater than both the state and nation. However, over the last five years it increased at a slower rate than the state and nation.

Per Capita Personal Income							Percent Change	
	1997	1998	1999	2000	2001	2002	1 year	5 year
United States	\$25,334	\$26,883	\$27,939	\$29,847	\$30,527	\$30,906	1.2%	22.0%
Wisconsin	\$24,514	\$26,175	\$27,135	\$28,573	\$29,361	\$30,050	2.3%	22.6%
Metropolitan WI	\$25,972	\$27,711	\$28,770	\$30,317	\$31,106	\$31,805	2.2%	22.5%
Winnebago County	\$24,291	\$26,034	\$26,775	\$28,217	\$28,776	\$29,537	2.6%	21.6%
In current dollars (adjusted to U.S. CPI-U)								
United States	\$28,397	\$29,670	\$30,170	\$31,181	\$31,010	\$30,906	-0.3%	8.8%
Wisconsin	\$27,478	\$28,889	\$29,301	\$29,850	\$29,825	\$30,050	0.8%	9.4%
Metropolitan WI	\$29,111	\$30,584	\$31,067	\$31,672	\$31,598	\$31,805	0.7%	9.3%
Winnebago County	\$27,227	\$28,733	\$28,913	\$29,479	\$29,231	\$29,537	1.0%	8.5%

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, May 2004



Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System, May 2004

The county workforce profiles are produced annually by the Office of Economic Advisors in the Wisconsin Department of Workforce Development. The author of this profile and regional contact for additional labor market information is:

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Sheboygan, WI 53081
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email: Richard.Seidemann@dwd.state.wi.us

Metropolitan Statistical Area (MSA) - A single county or group of counties that include at least one urbanized area with a minimum population of 50,000. Multiple-county MSAs have a central county or counties, which have a high degree of social and economic integration with the other member counties as measured by commuting data.

Non-metropolitan county - Any county that is not a member of a metropolitan statistical area.

Net Migration - One of two components of population change. It is the net result of individuals who either moved into or out of an area.

Natural Change - One of two components of population change. It is the result of the number of births minus the number of deaths in an area over a period of time. A natural increase indicates there were more births than deaths. A natural decrease indicates there were more deaths than births.

Employed - Persons 16 years of age or older, who worked as paid employees, or worked in their own business, profession or farm, or worked 15 hours or more as unpaid workers in a family-operated enterprise. Includes those temporarily absent from their jobs due to illness, bad weather, vacation, childcare problems, labor dispute, maternity or paternity leave, or other family or personal obligations.

Unemployed - Persons 16 years of age or older with no employment, who were available for work and made efforts to find employment sometime during the previous 4-week period ending with the monthly reference week. Persons who were awaiting recall to a job did not need to look for work to be classified as unemployed.

Labor Force - The sum of the employed and unemployed, whom are at least 16 years of age and older.

Unemployment Rate - The number of unemployed divided by the labor force. It is expressed as a percentage of the labor force.

Labor Force Participation Rate (LFPR) - The labor force divided by the total population aged 16 years and older. It is expressed as a percentage of the population aged 16 years and older.

Suppressed - Data is withheld or suppressed if it does not meet certain criteria. If an industry in a county has fewer than three employers or if a single employer employs 80% or more that industry's total employment in that county then the data are suppressed. These criteria were established to maintain the confidential reporting of payroll and employment by employers.

Total Personal Income - The aggregate income of an area received by all persons from all sources. It is calculated as the sum of wage and salary disbursements (less contributions for government social insurance), supplements to wages and salaries, proprietors' income with inventory valuation and capital consumption adjustments, rental income of persons with capital consumption adjustment, personal dividend income, personal interest income, and personal current transfer receipts that include retirement and veteran's benefits, government paid medical reimbursements, and income maintenance program payments.

Per Capita Personal Income (PCPI) - Total personal income divided by the total population.

Current Dollars - Phrase used to express historical dollar values in terms of their current purchasing power via inflation adjustment.

CPI-U - Consumer Price Index for all urban consumers, the most commonly used measure of inflation in the United States.